# SAMS I.Q. # 006

Issued: August 19, 2008

## Question #20 :

As a provider can I still claim my staff's meals in SAMS?  How do I do that?

## Answer:

Tech Support requested clarification from CSS Program and others, and they indicated:

"If the staff member is **not a paid** employee of the ..*provider and..* helps providing meal service, then the staff member is a volunteer, and may be served a meal, providing food is left after seniors have been served.  The ...*provider can then..* fill out a client intake form on the staff member and  can then claim NSIP and AAA reimbursement for the meal served."

Technically in SAMS, the volunteer unpaid staff member would be entered as a "Consumer".  In the consumer details, enter yes to NSIP as appropriate, and then enter the meal under "Service Delivery" as you would for any other "Consumer".   If the staff member is regularly served they can also be added to the Congregate Barcoded roster and then they can be scanned for delivery service the same as any other SAMS consumer.

## Question #21 :

I have been scanning my congregate meals using the roster (per Instructions in Help Sheet #9), I checked that the service deliveries in SAMS as instructed (Page 12) under comments and it shows the date of when the service was scanned vs. the actual day the service was delivered. What am I doing wrong?

## Answer:

You have not done anything wrong in your scanning or moving the data to SAMS.  You are correct, under the "Comments" section it will show you that the meals were updated and when that was transmitted to SAMS not when the meal service was delivered.  The notation in "Comments" is so you can track exactly when the update was done.  You will see that the meal will show in the correct Month and Year of when the Service was delivered (even if it is scanned

or entered in a later month.)  By the way, you should notate your scanned and updated rosters with the date of update to SAMS so you can match it back later if needed.   (see Question #22)

## Question #22 :

(Reference Question #21 above, and anticipating the next question, which we will pretend was sent in.)

Okay, I've scanned the congregate meal service (Help Sheet #9), where can I see that the actual meal was delivered on the **exact day** that I entered when I scanned the meals?

## Answer:

I am glad that you have asked, this allows us to introduce a very powerful feature that is available to you in SAMS.  The feature is the "Reports" section of SAMS, the following is a basic 101 of how to start using SAMS Reports.  A couple of things about "Reports;

- Reports require that you have data in SAMS in the area you are getting a report or it will be blank.

- Reports apply to all SAMS sections and services delivered (not just Nutrition which is used in the below example).

- Reports do not change the data in SAMS, so it is okay to try reports out, it will not damage any data.

- If you want to try a report out to experiment and see what is there, simply do not save the report format when you are done and it won't save it.

- Use the "Preview" button to see what the report will look like, after you input the perimeters.

Let's get a report that answers Question #22.

1.  Select "Reports" from the SAMS main menu.

2.  Select "Services" from the Reports menu on the left.

3.  Scroll down if needed on the Services Report list to "Consumer Services List…" double click on this report format.

4.  You now have the report perimeters screen this is used to "limit" what you will see on the report.

a. Title as you wish or if you are not saving it leave the title off. If you will be saving the report format in the future, we recommend putting your agency name/ID in the title first, then a name that is clear and easy to remember.

b. Report Section

    i. Group by : Service

    ii. Sort By: Last Name

    iii. Print Service: Yes

    iv. Print Service Details: Yes

    v. Print Consumer Details: Yes

    vi. Print Consumer Groups: Yes

c. Service Delivery

    i. Provider : Select your Provider name

5. Select the "Preview" button. The report if there is sufficient data will be by consumer last name and you can see the number of meals on the specific day of the month.

6. All reports work basically the same way, the perimeter screen limits or expands what will be on the report. Some filters limit, such as using "Status Date (on or after) = Starting Date" and "Status Date (on or before) = End Date" so that you can see one day, a series of days, a week or a month or more.

Try some reports and variations on the perimeters, you will like what SAMS can start doing for you.

**Question #23 :**

During the phone conference (Tuesday 08/12/08) and separately from some providers, raised questions about "Default Providers" in SAMS and if it is changed consumers can fall off of lists (rosters and routes) and it is causing a problem. Please clarify what can be done and who has priority as the "Default Provider"?

**Answer:**

Note: There are several items involved, please read the entire answer for solving the problem.

1. "Default Provider" is a designation that is automatically placed by SAMS on the first provider that is added to a consumer. This designation can be changed at any time. The Nutrition provider should be the "Default Provider" only for reason of volume. If nutrition is not involved in the service delivery it does not matter who is default (why will become clear later).

2. The designation of "Default Provider" simply means that when a service delivery is being completed it is the provider name that will first appear on the service screen ie by default.

3. If you are providing services and are not the Default Provider then be sure to add and/or select yourself as the consumer's service provider so this service will show to you as the service provider.

4. If you have experienced consumers being dropped from your lists (Rosters or Routes) it is probably because of the filters that are being used in the list (Roster or Route). To check this:

   a. Select Roster or Route from the SAMS main menu (they both use the same type of filters).

   b. Under General Filters use "**Consumer Provider**" and put your provider name in there, in general **leave Default Provider blank**.

   c. DO NOT USE "Default Provider" if you put your provider name in there, then when the default provider is changed the consumer will be 'dropped' (filter out) from your list (Roster or Route).